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DDS&T-637-83
4 August 1983

MEMORANDUM FOR: Chief, CRES/DDI
Chief, Technical Control/PCS/DDO
DDA Plans Officer
Chief, E&PS/FBIS
Special Assistant, NPIC

FROM: [redacted] 25X1
Chief, Planning Division, O/DDS&T

SUBJECT: FY 1986 R&D Planning Cycle

1. The 1985 R&D Planning Cycle has been completed. The RD&E program which was approved by the ExCom and is included within the 1985 Budget Estimates addresses the leading priorities of all customers. In order to implement a successful 1986 program, we must now begin planning by asking that you reevaluate your requirements and priorities with appropriate updates/deletions. The emphasis for 1986 will be on broader, more generic requirements that are amenable to R&D and which begin in three years with end products/operating system available in the 1989 to 1991 time frame.

2. A number of changes have been made to the 1986 planning procedures to reduce the amount of paperwork and to increase the interactions between consumers and DS&T offices. The three most noteworthy changes are:

a. The emphasis to be placed on long range requirements,

b. The reduction in paperwork attained by adapting the planning procedures to the budget cycle allows additional time to be devoted to new initiatives and to interaction before, during and after the 1986 planning cycle, and.

c. The restructuring of the schedule permits more effective coordination of the R&D program and more customer interaction prior to inclusion within the 1986 Program Call.

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3. The planning cycle is described in three attachments:

a. Schedule of Events (Attachment A)

b. R&D Planning Instructions -- 1986 (Attachment B)

c. Directory of Contacts (Attachment C)

4. You will note that submission of prioritized long range customer requirements for 1986 is due on 12 September 1983. Staff members will be calling you to discuss the 1986 R&D planning cycle. Please call me or any member of my staff if we can be of help.

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Attachments: a/s

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FY 1986 R&D Planning Cycle
Schedule

Date	Activity
5 August 1983	Requirements Call
12 September	Customer Requirements to PRS
26 September	Customer Requirements to offices
7 November	Office R&D program to PRS
21 November	R&D Program to customers for evaluation and comments
19 December	Customer evaluations and comments to PRS
21 December	Customer evaluations to offices for information
16-20 January 1984	DDS&T Approval
23 January	R&D Guidance to offices
23 January	R&D Program to customers

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Attachment B

R&D PLANNING INSTRUCTIONS -- 1986

1.0 - Introduction

The objective of the R&D Planning procedure for 1986 is to plan a coordinated program of research, development and engineering for 1986 that responds to the needs of the Intelligence Community and continues the advancement of state-of-the-art technology. This year the procedure has been revised to reduce the amount of paperwork while retaining the quality of information. The program will be structured along budgetary guidelines, with a Base and both ongoing and new initiatives .

The instructions have been divided into specific areas as follows:

Customer Requirements
R&D Proposals
Customer Evaluations

2.0 - Customer Requirements:

The Planning Division of O/DDS&T will begin the process by requesting prioritized requirements from our customer organizations (currently DDO, DDA, DDI, FBIS and NPIC). The requirements should be consistent with the findings of the 1982 Long Range Planning Studies and the Strategic Plan for 1982/1992. Review of the 1985 requirements for possible reinstatement or updates is suggested.

The results of many research and development efforts lie at least three years in the future. Therefore, renewed emphasis is being placed on requirements that address broad classes of problems rather than specific techniques, e.g., one long range requirement for physical security rather than a number of more specific shorter range problems. Each requirement statement should be as brief as practical.

2.1 - O/DDS&T Planning Division

The Planning Division will review all requirements and designate a direct or indirect involvement for each office prior to forwarding requirements to the R&D Offices.

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3.0 - R&D Proposals

Each R&D office will receive all of the requirements divided into two categories, direct and indirect, for their use in formulating their R&D program. A direct requirement is defined as one deemed to be applicable to the expertise of a specific office. An indirect requirement is defined as a requirement that an office should be aware of but may or may not wish to propose an initiative against.

The R&D program will be divided into three categories corresponding to the current budgetary guidelines; namely, Base, Ongoing and New Initiatives.

The R&D Base program will have a fixed funding level for each of the R&D Offices and should only contain projects that are underway and new efforts which replace developments that have been completed.

The Ongoing Initiatives, designated by the Comptroller, are major efforts with a defined funding profile and an established Final Operational Capability date.

New Initiatives are projects for new and innovative efforts to further enhance the Agency's capability not only in reserach and development but in all areas of activity.

During the period when the R&D offices are reviewing the customer's requirements and formulating the program it is their responsibility, when necessary, to establish a dialogue with the customers and the Planning Division to verify proper understanding of the problem and its scope prior to program submission.

The R&D program should be prepared in the format described in Attachment 1 and three copies forwarded to the Planning Division.

4.0 - Customer Evaluation

The Planning Division will review and forward the R&D proposals to each customer in accordance with the schedule.

The customer organization will be requested to provide a ranking of all of the new initiatives proposed. Comments are welcomed on the applicability of the Base and the Ongoing Initiatives, including appropriate suggestions for redirected efforts. Customer queries are encouraged for additional information and clarification of any proposal.

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5.0 R&D Program Approval, Guidance and Coordination

The Planning Division will draft the R&D program for the approval of the ADD/S&T and DD/S&T. The approved program will be coordinated with the customers and forwarded to the offices for inclusion in their 1986 Program Call.

Additional coordination is planned with the customer during the budget process:

a. Prior to the Excom Review

b. Prior to the Budget Estimates

c. Prior to the Congressional Budget

d. After Congressional Approval

e. Prior to beginning the Execution Year.

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ATTACHMENT 1

R&D PROGRAM PLANNING

1. The base program should be prepared on two pages in the following format:

a. Page "one": (Example attached)

(OFFICE) R&D PROGRAM
(Dollars in Thousands)

BASE PROGRAM

PROGRAM: (Title)

FUNDING:	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90
	$	$	$	$	$	$	$

REQUIREMENT: (Customer) # __, (Title of Requirement)

DESCRIPTION:

1. (Title of Effort) - Brief description

2. (Title of Effort) - Brief description

3. (Title of Effort) - Brief description

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b. Page "two" (two examples attached, one having specific component milestones, the other describing a program that is mainly level of effort.

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2. Each ongoing initiative having R&D funding should be prepared in the following format:

1. Page "one"

(OFFICE) ONGOING INITIATIVE
(Dollars in Thousands)

TITLE:

FUNDING:	FY 84	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90
Total Effort	$	$	$	$	$	$	$
R&D Funding	$	$	$	$	$	$	$

REQUIREMENT: (Customer) #__, (Title)

DESCRIPTION: (Describe the total effort and how R&D contributes)

b) Page "two": Same format as described in the base section. For ongoing initiatives, this sheet must describe specific milestones and components and include an Initial Operational Capability and/or Procurement/Production schedules.

NOTE: The funding profile for an ongoing initiative should be broken into two lines, the first the total budgeted amount for the initiative and the second that portion of the funding specifically designated R&D.

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3. Proposed new initiatives should be prepared in more detail and prioritized at the office level. New initiatives should not be grouped into programmatic areas. The format for each new initiative is as follows:

1) Page "one":

(OFFICE) NEW INITIATIVE #1
(Dollars in Thousands)

TITLE:

FUNDING:	FY 1986	FY 1987	FY 1988	FY 1989	FY 1990
Total Effort	$	$	$	$	$
R&D Funding	$	$	$	$	$

REQUIREMENT: (Customer) #__, (Title)

DESCRIPTION: (Describe the total effort and how R&D contributes)

2) Page "two": Same format as described in the base/ongoing section. For new initiatives, this sheet must describe specific milestones and components and include an Initial Operational Capability and/or Procurement/Production schedules.

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4. An office summary must be prepared and submitted in the following format:

(OFFICE) R&D Program

SUMMARY

	FY 1984	FY 1985	FY 1986
BASE Program			
1. (List of Programs	$	$	$
2. in Priority Order)	$	$	$
3.	$	$	$
.			
.			
TOTAL (OFFICE) BASE PROGRAM	$	$	$
ONGOING INITIATIVES			
(List)	$	$	$
TOTAL (OFFICE) ONGOING PROGRAM	$	$	$
TOTAL (OFFICE) BASE AND ONGOING PROGRAM	$	$	$
NEW INITIATIVES			
(List in Priority Order)	$	$	$
	$	$	$
TOTAL (OFFICE) NEW INITIATIVES	$	$	$
TOTAL (OFFICE) FY 1986 R&D PLAN	$	$	$

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